

Monday, July 18, 2016

The Probate Examiner's Office recommends approval of the following Probate matters:

13 15CEPR00836 Jose Antonio Garcia (Estate)

21 16CEPR00596 Jo Ann Rossi (Estate)

The following cases have been taken off calendar:

14 15CEPR01007 Kenneth Scott Davis (Estate)

Appearance of counsel is recommended for all remaining matters set for hearing. Thank you.

1 Samantha McDonald and Ebony McDonald (GUARD/P)

Case No. 03CEPR01684

Guardian: Diana McDonald (pro per)
Petitioner: Steven McDonald, JR (pro per)

Petition for Termination of Guardianship

			STEVEN MCDONALD, JR., father, is	NE	EDS/PROBLEMS/COMMENTS:
			petitioner.		
Co	nt. from 06131	6	DIANA MCDONALD, paternal grandmother, was appointed guardian on 3/30/06.	1.	Need Notice of Hearing. (Note: Proof of service shows parties were served with a copy of the Notice of Hearing,
	Aff.Sub.Wit.		Court Investigator Report filed on 6/7/16		however, the Notice of
✓	Verified		,		Hearing has not been filed. Because the Notice of
	Inventory				Hearing wasn't filed examiner
	PTC				is unsure of what date the
	Not.Cred.				parties were served for and if
	Notice of	Χ			service was proper.)
	Hrg			0	Need proof of sonios of the
	Aff.Mail	Χ		۷.	Need proof of service of the Notice of Hearing on:
	Aff.Pub.				a. Stephanie Seja (mother)
	Sp.Ntc.				b. Yolanda Guerrero Seja
	Pers.Serv.				(maternal grandmother) –
	Conf.				Document filed states
	Screen				service on Yolanda Seja was unsuccessful because
	Letters				"subject unknown by area
	Duties/Supp				occupants; no apt number
	Objections				given."
	Video				
	Receipt				
	CI Report				
	9202				
✓	Order				
	Aff. Posting				viewed by: KT
	Status Rpt				viewed on: 7/14/16
	UCCJEA				odates:
	Citation				commendation:
	FTB Notice			File	e 1- McDonald

2 Randi Taylour Robinson-Cervantes (GUARD/PE) Case No. 10CEPR00724

Petitioner: Elena K. Pena (pro per, Guardian of the Person)

Attorney: Heather H. Kruthers (for Public Guardian, Guardian of the Estate)

Petition to Fix Residence Outside the State of California

		ELENA PENA , Guardian of the person, is	NEEDS/PROBLEMS/COMMENTS:
Co ✓	nt. from 062016 Aff.Sub.Wit. Verified Inventory PTC Not.Cred.	petitioner. ELENA PENA, sister, was appointed guardian of the person on 7/26/11. PUBLIC GUARDIAN was appointed guardian of the estate on 6/12/12. Father: Unknown	1. Petition does not indicate the duration of the out-of-state move (#5 of the petition). If the move is expected to be more than four months a guardianship of the person will need to be commenced in the place of the new residence. The guardianship of the estate will remain in Fresno.
✓	Notice of Hrg	Mother: Deceased Paternal grandparents: unknown Maternal grandfather: Jose Cervantes	пезпо.
✓	Aff.Mail W/	Maternal grandmother: Helen Cervantes	
	Sp.Ntc.	Petitioner request permission to fix the residence of the minors outside the state	
	Pers.Serv. Conf. Screen	of California to Oregon. She has a new marriage and her husband lives in Oregon and they will be moving to live	Note: If the Petition is granted a
	Letters Duties/Supp	with him.	status hearing will be set on Wednesday, January, 18, 2017, at 9:00 a.m. in Dept. 303 for the filing of
	Objections		proof of establishment of a
	Video Receipt		guardianship of the person in Oregon.
	CI Report		
	9202		
✓	Order		
	Aff. Posting		Reviewed by: KT
<u> </u>	Status Rpt		Reviewed on: 7/13/16
	UCCJEA Citation		Updates: Recommendation:
	FTB Notice		File 2- Robinson-Cervantes
			2

3A Augustin G. Galvan (Estate) Case No. 12CEPR00883

Attorney Kruthers, Heather H. (for Public Administrator)

Attorney Milnes, Michael A. (for Contestants Hope De Santiago and Stephen Galvan)

Petition for Probate of Will and for Letters of Administration with Will Annexed; Authorization

to Administer Under the Independent Administration of Estates Act

1	D: 10/3/11	FRESNO COUNTY PUBLIC	NEEDS/PROBLEMS/COMMENTS:
Con	t. from 121515,	ADMINISTRATOR is Petitioner and requests appointment as Administrator with Will Annexed with Full IAEA without bond.	Minute Order 5/4/16: The Public Administrator has no objection to Mr. Milnes' clients being appointed. The Court grants the Public Administrator the right temporarily to have control over the assets under the §7660 petition.
0408 0601	716, 030216, 816, 050416, 116 Aff.Sub.Wit. S/P Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv.	Full IAEA – ok Will dated 8/11/09 Residence: Fresno Publication: Business Journal Estimated value of estate: Real property: \$311,000.00 Probate Referee: Rick Smith Contest and Grounds for Objection to Probate of	Note: Contest and Grounds for Objection to Probate of Purported Will & of Appointment of Personal Representative was filed 3/16/16; however, it does not appear that a summons was submitted therewith for issuance pursuant to Probate Code §8250, and because the document indicated this continued hearing date of 4/6/16, the Contest was not assigned it's own separate hearing date at the counter. Due to notice requirements, the Contest cannot be heard until defects are addressed. The Court may wish to set the Contest for noticed hearing pursuant to Probate Code §8250 at this time. On 4/6/16, Mr. Milnes was admonished to address the defects in the will contest; however, nothing further has been filed.
✓ ✓	Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report	Purported Will & of Appointment of Personal Representative was filed 3/16/16. See Page 2.	SEE ADDITIONAL PAGES
V	9202 Order Aff. Posting Status Rpt UCCJEA Citation FTB Notice		Reviewed by: skc Reviewed on: 7/13/16 Updates: 7/14/16 Recommendation: File 3A - Galvan

Page 2

Contest and Grounds for Objection to Probate of Purported Will & of Appointment of Personal Representative filed 3/16/16 BY Hope De Santiago and Stephen Galvan, daughter and son, states:

A document dated 8/11/09 purporting to be the last will was filed in this court on 11/9/11. Petitioners are informed and believe and thereon allege that the decedent left no valid Will. Probate of the purported will should be denied on the following grounds:

- 1. The decedent was not of sound and disposing mind and therefore lacked testamentary capacity at the time of the alleged execution of the purported will.
- 2. At the time of signing, the decedent was fluent in the Spanish language and not the English language use dint he purported will, and the decedent was not able to read or understand documents written in the English language. As a result, the decedent was not able to understand or comprehend the meaning and effect of the English words used in the purported will and their significance, therefore the decedent lacked testamentary intent and the signature of the decedent to the purported will was executed by the decedent under a mistake as to its legal effect.
- 3. Petitioners allege the purported will is not and never was the decedent's will as it was made as a direct result of undue influence on the decedent by his son, **ARTHUR G. GALVAN**, and other members of his family, and it is now (sic) and never was the will of the decedent.

See contest for description of the undue influence.

Contestants also object to appointment of the Public Administrator. Petitioners state on 5/10/13, the PA was appointed under Probate Code §7660 in **13CEPR00400** and since that date has served in that capacity. In connection with this new appointment, the PA failed to give proper notice to the intestate heirs

NEEDS/PROBLEMS/COMMENTS:

- 1. Petitioner lists only the decedent's four living children at #8; however, it appears that there are additional people entitled to notice of this proceeding, including:
 - Vanessa Galvan (Daughter of deceased son Frank Garcia Galvan, mentioned in the will)
 - Vivian Saicon (Granddaughter and Named alternate executor and former conservator of the person)

Therefore, need revised declaration re #8 and proof of service of Notice of Petition to Administer Estate on Vanessa Galvan and Vivian Saicon at least 15 days prior to the hearing per Probate Code §8110.

<u>Note</u>: Petitioner's #8 indicates that the will provides for distribution to a trust; however, that does not appear to be the case. Need clarification.

2. Need date of death of Frank Garcia Galvan per Local Rule 7.1.1.D. <u>Note</u>: Declaration filed 2/26/16 indicates a date of death for a <u>David</u> Garcia Galvan. Is this a typo? There is no *David* listed at #8.

Note: If granted, the Court will set status hearings as follows:

- Wednesday, January 11, 2017 for fling Inventory and Appraisal
- Wednesday August September 20, 2017 for filing the first account or petition for final distribution

Augustin G. Galvan (Estate)
Milnes, Michael A. (for Petitioner Dorothy M. Galvan)

Petition for Letters of Administration with IAEA with Limited Authority

with Limited IAEA, without bond, funds to be deposited into a blocked account. Limited IAEA – ok Petitioner states Decedent died intestate. (See below.) Residence: Fresno Publication: Business Journal PTC PtC Not.Cred. With Limited IAEA, without bond, funds to be deposited into a blocked account. Limited IAEA – ok Petitioner states Decedent died intestate. (See below.) Residence: Fresno Publication: Business Journal Estimated value of estate: Personal property: Unknown	Note: Notice of Suspension of Attorney and Substitution of Petitioner In Pro Per (pleading form) was filed on 7/14/16. However, no Substitution of Attorney has been filed on the Mandatory Judicial Council Form has
Limited IAEA – ok Aff.Sub.Wit. Petitioner states Decedent died intestate. (See below.) Verified Residence: Fresno Publication: Business Journal Estimated value of estate: Personal proportion Limited IAEA – ok Petitioner states Decedent died intestate. (See below.) Residence: Fresno Publication: Business Journal Estimated value of estate: Personal proportion Limited IAEA – ok Petitioner states Decedent died intestate. (See below.)	Attorney and Substitution of Petitioner In Pro Per (pleading form) was filed on 7/14/16. However, no Substitution of Attorney has been filed on the Mandatory Judicial
Aff.Sub.Wit. Petitioner states Decedent died intestate. (See below.) Verified Residence: Fresno Publication: Business Journal Estimated value of estate: Personal proporty University	Substitution of Petitioner In Pro Per (pleading form) was filed on 7/14/16. However, no Substitution of Attorney has been filed on the Mandatory Judicial
✓ Verified Residence: Fresno Inventory Publication: Business Journal Estimated value of estate: Property	(pleading form) was filed on 7/14/16. However, no Substitution of Attorney has been filed on the Mandatory Judicial
Inventory	filed on 7/14/16. However, no Substitution of Attorney has been filed on the Mandatory Judicial
PTC Estimated value of estate:	Substitution of Attorney has been filed on the Mandatory Judicial
Dorono di proporti il linko ovi in	Attorney has been filed on the Mandatory Judicial
	filed on the Mandatory Judicial
Notice of Real property: \$172,100.00	
Probate Referee: Rick Smith	I Council Form has
Y Aff.Mail W Petitioner states: The real property used in calculating	been filed; therefore,
the estimated value of the estate consists of three	Court Records still
Sp.Ntc. parcels located in Arvin, Kern County, CA. Title of	reflect Mr. Milnes as
Pers.Serv. record is in the name of the decedent but is subject to a quiet title action now pending in Kern County	attorney of record.
Conf. Screen a quiet title action now pending in Kern County Superior Court.	SEE ADDITIONAL
Lotters	PAGES
Duties/Supp X A document dated 8/11/09 purporting to be the last will of the decedent was filed in this court on 11/9/11.	
Objections This document was the subject of the Fresno County	
Video Public Administrator's petition filed 11/19/15 to be	
Receipt admitted as the decedent's will. At hearing on 4/6/16,	
the attorney for the Public Administrator said that it had no interest in the relief sought in the will contest.	
On 5/4/16, the Court dismissed the petition subject to	
Order X the filing of another petition for appointment of an	
Aff. Posting administrator.	Reviewed by: skc
Status Rpt Petitioner does not believe the document dated	Reviewed on: 7/13/16
UCCJEA 8/11/09 is a legally valid will and therefore is alleging in	Updates: 7/14/16
Citation that the decedent died intestate.	Recommendation:
Petitioner states she, Dorothy M. Galvan, is a creditor of the decedent, and is entitled to appointment under §8461 (q). In addition to the Creditor's Claim filed in this proceeding, Petitioner is Plaintiff in a civil action in Kern County (Dorothy M. Galvan vs. Estate of Augustin G. Galvan by the Public Administrator, Case No. BCV-15-10080, which seeks to quiet title by adverse possession to three parcels of real property located in Arvin, Kern County, CA, titled in the name of the decedent that have been continuously occupied by Dorothy M. Galvan and Frank Galvan since the 1990s. Petitioner states upon dismissal of the proceeding by the Fresno County Public Administrator, Petitioner will amend the civil action to make the only the defendants all of the heirs of the decedent.	File 3B- Galvan

Case No. 12CEPR00883

Page 2 - For reference, Examiner provides the following information and history gleaned from this estate file 12CEPR00883 and related matters: Conservatorship 11CEPR00883 and §7660 13CEPR00400:

- Augustin G. Galvan had five children: Frank, Arthur, Steven, Hope, and Augustin Jr.
 Son Frank predeceased, survived by one daughter: Vanessa.
 Son Arthur predeceased, survived by five children: Arthur Jr., Vivian, Maryellen, Josefina, Lucy.
- On 11/20/11, **Vivian** filed for conservatorship in 11CEPR00049, with reference to a Durable General Power of Attorney dated 8/11/09 naming her, or alternatively her sister Maryellen, as attorney-in-fact. The petition stated that conservatorship was needed to settle two matters: 1) a personal injury matter in Fresno County Superior Court (10CECG00968 Augustin Galvan vs. Paul DeSantiago) that had been settled for \$3,000.00; and 2) a real property matter in Kern County (S-1500-CV-269224-SPC Dorothy Galvan vs. Agustin Galvan) that was pending settlement. The attached proposed settlement indicated Augustin was to quitclaim 1408 Haven Drive to Dorothy, and Dorothy was to quitclaim 1348 Haven Drive, plus a vacant lot of 1.75 acres, to Augustin.
- On 3/3/11, the Court appointed Vivian Conservator of the Person and Public Guardian as Conservator of the Estate. Decedent died 10/3/11, prior to the filing of an Inventory and Appraisal.
- On 11/9/11, a Will dated 8/11/09 (same date as DPOA) was lodged with this court by Attorney J. Patrick Sullivan. The self-proving will includes a Certificate of Translation of Foreign Language and devises the entire estate to Arthur, or his children.
- PG's Final I&A for the conservatorship estate filed 7/11/12 indicated a total value of \$184,293.46 at appointment (3/3/11) consisting of \$11,993.46 cash plus **one parcel** of real property in Arvin, CA (**1408 Haven Drive-\$172,000**) and misc. personal property (\$300).
- PG's Final Account did not indicate any transactions involving the litigation. Ending POH at 7/16/12 was \$1,265.22 cash plus 1408 Haven Drive (\$172,000) and misc. personal property (\$100). Order filed 10/17/12 provided for delivery of the assets to the Public Administrator upon appointment and authorized a lien on the estate for fees and costs.
- On 10/3/12, Dorothy M. Galvan, wife of predeceased son Frank, in proper, filed for Letters of
 Administration, along with a Creditor's Claim for \$400,000.00, alleged intestate, and estimated the estate
 value the same as set forth in the PG's final account.
- On 11/8/12, Dorothy did not appear; Attorney Milnes appeared and objected on behalf of daughter Hope. Dorothy's petition was denied. Minute Order states: The Court notes that counsel has made a representation that a Will will be lodged with the Court and the Public Administrator is contemplating filing a petition. (Note: The will had apparently already been lodged.)
- On 5/10/13, Public Administrator filed for administration under §7660 (13CEPR00400), alleging that the value was not expected to exceed \$150,000.00 and that the decedent died intestate. Order was entered thereon on 5/14/13. Creditor's Claims were filed in 13CEPR00400 by Attorney Flora Istanboulian for \$1,650.00 granted 5/17/11 in the conservatorship and by the FTB for \$3,011.46, with Request for Special Notice.
- No Final I&A was ever filed in the §7660; however, on 1/15/14, the PG filed an "Appraisal for Sale" with a total value of \$261,000 including all three (3) parcels: 1) 1408 Haven Drive (\$191,000),
 2) 1348 Haven Drive (\$35,000), and 3) additional parcel (\$35,000). (Note: These values appear as of filing date, not date of death, since it was filed as "Appraisal for Sale.") Nothing further was filed in 13CEPR00400, likely because the value exceeds authority under §7660 (\$150,000).
- On 11/19/15, the PA filed the Petition for Probate of Will (Page A) in 12CEPR00883, which estimated the estate to contain real property valued at \$311,000.00. This estimate appears to be a date-of-death value of all three parcels.

Page 3 – NEEDS/PROBLEMS/COMMENTS:

- 1. The Notice of Petition to Administer Estate filed 7/13/16 does not indicate that Petitioner has requested authority under IAEA at #5. This includes limited authority. The Court may require further revised notice to all parties previously served.
- 2. The Notice of Petition to Administer Estate filed 7/13/16 indicates service on the Public Administrator, but not on County Counsel, her attorney. The Court may require further notice pursuant to Probate Code §1214.
- 3. The California Franchise Tax Board filed a Creditor's Claim and Request for Special Notice in 13CEPR00400, the prior administration under §7660. Although the cases have not been formally consolidated, the Court may require special notice to the FTB of this change in administration.
- 4. The Court may also require notice to anyone else who may be affected, including counsel, under the various matters being litigated in Fresno County and Kern County.
- 5. Need Duties and Liabilities of Personal Representative, Confidential Supplement (DE-147, 1478).
- 6. The decedent's Will dated 8/11/09 was lodged with the Court by Attorney J. Patrick Sullivan on 11/9/11 pursuant to §8200. On its face, it appears valid. It appears to be duly executed and self-proving, contains a Certificate of Translation of Foreign Language, and is dated the same date as the Durable Power of Attorney referenced in the conservatorship estate.

The will names Arthur (deceased), or alternatively Vivian as Executor and devises the estate to Arthur or his children. The Public Administrator's petition at Page A seeks to admit the will to probate; however, Mr. Milnes, representing Hope and Steven, filed a contest, which has not yet been properly noticed or heard.

This petition simply alleges that the will is invalid and seeks to probate the estate as intestate.

The Court may require authority or further information as to why the will is alleged to be invalid and should not be admitted.

- 7. At Attachment 3(c), Petitioner alleges that the estate consists of https://doi.org/10.10, Petitioner alleges that the estate consists of https://doi.org/10.10, Petitioner alleges that the estate consists of https://doi.org/10.10, Petitioner alleges that the estate consists of https://doi.org/10.10, Petitioner alleges that the estate consists of https://doi.org/10.10, Petitioner alleges that the estate consists of https://doi.org/10.10, Petitioner alleges that the estate consists of https://doi.org/10.10, Petitioner alleges that the estate consists of https://doi.org/10.10, Petitioner alleges that the estate consists of https://doi.org/10.10, Petitioner alleges that the estate consists of https://doi.org/10.10, Petitioner alleges that the estate consists of https://doi.org/10.10, Petitioner alleges that the estate consists of https://doi.org/10.10, Petitioner alleges that the estate consists of https://doi.org/10.10, Petitioner alleges that the estate consists of https://doi.org/10.10, Petitioner alleges that the estate consists of https://doi.org/10.10, Petitioner alleges that the estate consists of https://doi.org/10.10, Petitioner alleges that the estate consists of https://doi.org/10.10, Petitioner alleges that the estate consists of https://doi.org/10.10, Petitioner alleges that the estate consists of https://doi.org/10.10, Petitione
- 8. Petitioner states at Attachment 3(f)(2)(a) that she is seeking quiet title by adverse possession to <u>all three parcels</u> of real property. Examiner notes that if Petitioner is successful, it appears the estate will have no assets and will likely be closed as insolvent.

However, this stated intent appears contrary to the information that was previously provided to the Court in the form of a proposed settlement attached to Ms. Saicon's conservatorship petition, which appeared to be a property exchange.

The Court may require further clarification regarding the status of the alleged estate assets – Were all parcels held in the decedent's name at his death? Why were the other parcels not previously identified during conservatorship and prior estate proceedings?

9. The Court may also require further information and status of the various other litigation.

Note: If granted, the Court will set status hearings as follows:

- Wednesday, January 11, 2017 for fling Inventory and Appraisal
- Wednesday August September 20, 2017 for filling the first account or petition for final distribution

Atty

Flanigan, Philip M. (for John T. Laettner – Executor)

Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

DOD: 01/16/2005	JOHN T. LAETTNER, son, was appointed Executor with	NEEDS/PROBLEMS/COMMENTS:
	full IAEA authority without bond on 01/23/2013.	
	i	Minute order of 01/04/2016:
	Letters issued 01/29/2013.	Counsel reports there was legal
Cont. from 032814,		action for abandonment that
033015, 111615,	Inventory and Appraisal filed 07/10/2013 shows a value of \$12,892.00.	went against the estate with regard to the mineral rights,
010416	Value of \$12,072.00.	and now pending legal
Aff.Sub.Wit.	Declaration of Philip M. Flanigan and Status Report	malpractice suit; an additional
Verified	filed 07/05/2016 states John T. Laettner needed to be	six months is requested.
Inventory	appointed as Executor of the decedent's estate in	·
PTC	order to receive an interest in mineral rights in	
	Nebraska that were the subject of a quiet title action.	Need First Account or
Not.Cred.	The Court order filed July 6, 2013, declared the mineral	Petition for Final Distribution.
Notice of	rights held by the decedent were abandoned. An	
Hrg	appeal of this Order was dismissed by the Nebraska	
Aff.Mail	Court of Appeals on 02/23/2015 (Case No. A-15-00073). Specifically at issue, the attorney handling the	
Aff.Pub.	appeal failed to respond to an Order to Show Cause	
Sp.Ntc.	issued by the Court of Appeals, resulting in the	
Pers.Serv.	dismissal of the appeal. The Petitioner since, has filed a	
Conf.	case Federal Court (Case No. 4:15-cv-03123), and the	
Screen	trial will be tried in Lincoln, Nebraska. The Defendant in	
Letters	the case filed a Change of Venue Motion that has	
Duties/Supp	been denied. The parties were ordered into	
Objections	Mediation, which was held on 04/20/2016 and was	
Video	not successful. The Plaintiff (Petitioner) filed a Motion for Affirmative Summary Judgment on the issue of	
Receipt	proximate cause on 06/15/2016. Any reply is due by	
CI Report	07/30/2016. After that, Magistrate Cheryl Zwart will set	
9202	further schedules within ten days of the ruling on the	
Order	Motion. Petitioner is represented by attorney David	
Aff. Posting	Domina of Omaha, NE, in the negligence matter.	Reviewed by: LV
Status Rpt	Petitioner respectfully requests that this probate matter	Reviewed on: 07/12/2016
UCCJEA	be continued six months pending the results of the negligence matter.	Updates:
Citation	nogiigorice maner.	Recommendation:
FTB Notice		File 4 - Mullennix
	.и.	

Attorney

Kruthers, Heather H. (for Public Guardian)

Status RE: Termination of Proceeding for Deceased Conservatee

DOD: 1/14/16	The FRESNO COUNTY PUBLIC GUARDIAN	NEEDS/PROBLEMS/COMMENTS:
	was appointed Conservator of the	
	Estate on 8/26/14.	1. Need final account.
	=	
	Conservator's First Account was settled	
	on 10/22/15.	
Aff.Sub.Wit.		
Verified	The Conservator informed the Court	
Inventory	that the Conservatee passed away on	
PTC	1/14/16.	
Not.Cred.	On 1/19/16, the Court set this status	
Notice of	hearing for termination of proceeding	
Hrg	for deceased Conservatee and sent	
Aff.Mail	notice to the Conservator, County	
Aff.Pub.	Counsel.	
Sp.Ntc.	Status Report filed 7/13/16 states the	
Pers.Serv.	Public Guardian was short-staffed for	
Conf.	several months. That office is now back	
Screen	up to reasonable staffing and is able to	
Letters	prepare accountings. In fact, at least	
Duties/Supp	five were filed in the last three weeks.	
Objections	However, the account clerk is not able to get all of the accounts done by their	
Video	status hearing dates. In addition, the	
Receipt	person who prepares the schedules	
CI Report	and documents is currently helping with	
9202	fiscal year inventory reports.	
Order	<u></u>	
Aff. Posting	Therefore, it is respectfully requested	Reviewed by: skc
Status Rpt	that the next status hearing be set no sooner than 60 days from the date of	Reviewed on: 7/13/16
UCCJEA	this hearing.	Updates:
Citation		Recommendation:
FTB Notice		File 5- Rousseau

6A Jade Dylon Graff (CONS/PE)

Case No. 14CEPR00171

Petitioner Sovern, Sharon Kaye (Pro Per – Conservator - Maternal Grandmother)

First Account and Report of Sharon Sovern of the Person and Estate, Petition for Approval

petitioner. Account period: 05/20/2014 through 03/02/2016 Conf. from 050216, 061316 Aff.Sub.Wit. Aff.Sub.Wit. Pric Not.Cred. Notice of Hrg Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen ✓ Letters Screen ✓ Letters Petitioner. Account period: 05/20/2014 through 03/02/2016 Accounting: \$15,092.35 Beginning POH: \$15,090.00 Ending POH: \$12,725.29 Conservator – Waives Minute Order of 06/13/2016: NO APPEARANCES – The Court issues Order to Show Cause to Sharon I Sovern as to why she should not I removed as Conservator for herifile amended accounting as me in the examiner notes. Ms. Sovern in the examiner notes. Ms. Sovern ordered to be personally present on 07/18/2016: Examiner notes is small, and it is not cost effective to prepare the account and pay the filling fee for filling the petition. Therefore the petitioner asks the Court to dispense with further accountings. Petitioner requests: that the Court dispense with future accounting so me in the examiner notes. Ms. Sovern ordered to be personally present on 07/18/2016: Examinetes provided in open court. Minute Order of 06/13/2016: NO APPEARANCES – The Court issues Order to Show Cause to Show Ca	an (aye be ailure to ntioned n is in Court
Cont. from 050216, 061316 Aff.Sub.Wit. ✓ Verified PTC Not.Cred. ✓ Nofice of Hrg Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen ✓ Letters Account period: 05/20/2014 through 03/02/2016 by the Court for the Conservator to appear on 06/13/2016. Minute Order of 06/13/2016: NO APPEARANCES – The Court issues ordered to Sharon I Sovem as to why she should not I removed as Conservator for hereifile amended accounting as me in the examiner notes. Ms. Sovem as to why she should not I removed as Conservator for hereifile amended accounting as me in the examiner notes. Ms. Sovem ordered to be personally present on 07/18/2016. Minute Order of 06/13/2016: NO APPEARANCES – The Court issues ordered as Conservator for hereifile amended accounting as me in the examiner notes. Ms. Sovem ordered to be personally present on 07/18/2016. Minute Order of 05/02/2016: Examinate ordered to be personally present ordere	an (aye be ailure to ntioned n is in Court
Conf. from 050216, 061316 Accounting: \$15,092.35 Beginning POH: \$15,090.00 Ending POH: \$12,725.29 Conservator – Waives PTC Petitioner requests: that the Court dispense with future accountings because all funds are in a blocked account and cannot be withdrawn without a court order, so the court is aware of all withdrawals. The account balance is small, and it is not cost effective to prepare the account and pay the filing fee for filing the petition. Therefore the petitioner asks the Court to dispense with further accountings. √ Letters 5/20/14 Duties/Supp to appear on 06/13/2016. Minute Order of 06/13/2016: NO APPEARANCES – The Court issues Order to Show Cause to Sharron Isovern as to why she should not I removed as Conservator for her file amended accounting as me in the examiner notes. Ms. Sover ordered to be personally present on 07/18/2016. Minute Order of 05/02/2016: Examinate of the petition of the proposed Order shall be submitted with all pleading request relief. If the proposed order is not received in the Probate Filing Clerk's Office (110) draws before the scheep.	an Caye De ailure to ntioned n is in Court
Conf. from 050216, 061316 Accounting: \$15,092.35 Beginning POH: \$15,090.00 Ending POH: \$12,725.29 Conservator – Waives PTC Not.Cred. ✓ Notice of Hrg ✓ Aff.Mail ✓ Aff.Mail ✓ Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen ✓ Letters 5/20/14 Duties/Supp Accounting: \$15,092.35 Beginning POH: \$15,090.00 Ending POH: \$10,000 Ending POH: \$15,090.00 Ending POH: \$10,000 Ending POH: \$15,090.00 Ending POH: \$10,000 En	Caye be ailure to ntioned n is in Court
Accounting: \$15,092.35 Beginning POH: \$15,090.00 Ending POH: \$12,725.29 Sovern as to why she should not or removed as Conservator for herifile amended accounting as me in the examiner notes. Ms. Sovern as to why she should not or removed as Conservator for herifile amended accounting as me in the examiner notes. Ms. Sovern as to why she should not or removed as Conservator for herifile amended accounting as me in the examiner notes. Ms. Sovern as to why she should not or removed as Conservator for herifile amended accounting as me in the examiner notes. Ms. Sovern as to why she should not or removed as Conservator for herifile amended accounting as me in the examiner notes. Ms. Sovern as to why she should not or removed as Conservator for herifile amended accounting as me in the examiner notes. Ms. Sovern as to why she should not or removed as Conservator for herifile amended accounting as me in the examiner notes. Ms. Sovern as to why she should not or removed as Conservator for herifile amended accounting as me in the examiner notes. Ms. Sovern as to why she should not or removed as Conservator for herifile amended accounting as me in the examiner notes. Ms. Sovern as to why she should not or removed as Conservator for herifile amended accounting as me in the examiner notes. Ms. Sovern as to why she should not or removed as Conservator for herifile amended accounting as me in the examiner notes. Ms. Sovern as to why she should not or removed as Conservator for herifile amended accounting as me in the examiner notes. Ms. Sovern as to why she should not or removed as Conservator for herifile amended accounting as me in the examiner notes. Ms. Sovern as to why she should not or removed as Conservator for herifile amended accounting as me in the examiner notes. Ms. Sovern as to why she should not or removed as Conservator for herifile amended accounting as me in the examiner notes. Ms. Sovern as to why she should not or removed as Conservator for herifile amended accounting as me in the examiner notes. M	Caye be ailure to ntioned n is in Court
Aff.Sub.Wit. Beginning POH: \$15,090.00 Finding POH: \$15,090.00 Ending POH: \$12,725.29 Conservator – Waives PTC Not.Cred. ✓ Notice of Hrg ✓ Aff.Mail ✓ Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen ✓ Letters 5/20/14 Duties/Supp Beginning POH: \$15,090.00 Ending POH: \$15,090.00 Ending POH: \$15,090.00 Ending POH: \$15,090.00 APPEARANCES – The Court issues Order to Show Cause to Sharon I Sovern as to why she should not I removed as Conservator for herifile amended accounting as me in the examiner notes. Ms. Sovern ordered to be personally present on 07/18/2016. Minute Order of 05/02/2016: Examinating the petition. Therefore the petitioner asks the Court to dispense with further accountings. Minute Order of Show Cause to Sharon I sovern as to why she should not I removed as Conservator for herifile amended accounting as me in the examiner notes. Ms. Sovern ordered to be personally present on 07/18/2016. Minute Order of Show Cause to Sharon I sovern as to why she should not I removed as Conservator for herifile amended accounting as me in the examiner notes. Ms. Sovern ordered to be personally present on 07/18/2016. Minute Order to Show Cause to Sharon I sovern as to why she should not I removed as Conservator for herifile amended accounting as me in the examiner notes. Ms. Sovern ordered to be personally present on 07/18/2016. Minute Order to Show Cause to Sharon I sovern as to why she should not I removed as Conservator for herifile amended accounting as me in the examiner notes. Ms. Sovern ordered to be personally present on 07/18/2016. Minute Order to Show Cause to Sharon I sovern as to why she should not I removed as Conservator for herifile amended accounting as me in the examiner notes. Ms. Sovern ordered to be personally present on 07/18/2016. Minute Order to Show Cause to Sharon I sovern as to why she should not I removed as Conservator for herifile amended accounting ordered to be personally present on 07/18/2016.	Caye be ailure to ntioned n is in Court
✓ Verified Ending POH: \$12,725.29 Order to Show Cause to Sharon In Sovem as to why she should not be removed as Conservator for her file amended accounting as me in the examiner notes. Ms. Sovem as to why she should not be removed as Conservator for her file amended accounting as me in the examiner notes. Ms. Sovem as to why she should not be removed as Conservator for her file amended accounting as me in the examiner notes. Ms. Sovem as to why she should not be removed as Conservator for her file amended accounting as me in the examiner notes. Ms. Sovem as to why she should not be removed as Conservator for her file amended accounting as me in the examiner notes. Ms. Sovem as to why she should not be removed as Conservator for her file amended accounting as me in the examiner notes. Ms. Sovem as to why she should not be removed as Conservator for her file amended accounting as me in the examiner notes. Ms. Sovem as to why she should not be removed as Conservator for her file amended accounting as me in the examiner notes. Ms. Sovem as to why she should not be removed as Conservator for her file amended accounting as me in the examiner notes. Ms. Sovem as to why she should not be removed as Conservator for her file amended accounting as me in the examiner notes. Ms. Sovem as to why she should not be removed as Conservator for her file amended accounting as me in the examiner notes. Ms. Sovem as to why she should not be removed as Conservator for her file amended accounting as me in the examiner notes. Ms. Sovem as to why she should not be with drawals. The accounting are in the examiner notes. Ms. Sovem as to why she should not be file amended accounting as me in the examiner notes. ✓ Invertible Invertibl	Caye be ailure to ntioned n is in Court
✓ Inventory Conservator – Waives Sovern as to why she should not be removed as Conservator for her file amended accounting as me in the examiner notes. Ms. Sovern are in a blocked account and cannot be withdrawn without a court order, so the court is aware of all withdrawals. The account balance is small, and it is not cost effective to prepare the account and pay the filing fee for filing the petition. Therefore the petitioner asks the Court to dispense with further accountings. Minute Order of 05/02/2016: Examinates provided in open court. Notice of Hrg W/ Aff.Mail W/ Aff.Pub. Withdrawn without a court order, so the court is aware of all withdrawals. The account balance is small, and it is not cost effective to prepare the account and pay the filing fee for filing the petition. Therefore the petitioner asks the Court to dispense with further accountings. Ninute Order of 05/02/2016: Examinotes provided in open court. Conf. Screen V Letters 5/20/14 Duties/Supp To the petition of the court dispense with further accountings. Ninute Order of 05/02/2016: Examinotes provided in open court. Letters 5/20/14 To count to dispense with further accountings.	oe ailure to ntioned n is in Court
PTC Not.Cred. Notice of Hrg Aff.Pub. Sp.Ntc. Pers.Serv. Conservator – Waives Conservator – Waives Petitioner requests: that the Court dispense with future accountings because all funds are in a blocked account and cannot be withdrawn without a court order, so the court is aware of all withdrawals. The account balance is small, and it is not cost effective to prepare the account and pay the filing fee for filing the petition. Therefore the petitioner asks the Court to dispense with further accountings. Conf. Screen ✓ Letters 5/20/14 Duties/Supp Conservator – Waives removed as Conservator for her file amended accounting as me in the examiner notes. Ms. Soven ordered to be personally present on 07/18/2016. Minute Order of 05/02/2016: Examinate of the period of the p	ailure to ntioned n is in Court
Petitioner requests: that the Court dispense with future accountings because all funds are in a blocked account and cannot be withdrawn without a court order, so the court is aware of all withdrawals. The account balance is small, and it is not cost effective to prepare the account and pay the filing fee for filing the petition. Therefore the petitioner asks the Court to dispense with further accountings. Petitioner requests: that the Court dispense with future accountings because all funds are in a blocked account and cannot be withdrawn without a court order, so the court is aware of all withdrawals. The account and pay the filing fee for filing the petition. Therefore the petitioner asks the Court to dispense with further accountings. Petitioner requests: that the Court dispense with future account and cannot be withdrawn without a court order, so the account and pay the filing fee for filing the petition. Therefore the petitioner asks the Court to dispense with further accountings. 1. Need Order. Local Rule 7. a proposed Order shall be submitted with all pleading request relief. If the proposed order is not received in the Probate Filing Clerk's Office (10) days before the schedule.	n is in Court
Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Duties/Supp Petitioner requests: that the Court dispense with future accountings because all funds are in a blocked account and cannot be withdrawn without a court order, so the court is aware of all withdrawals. The account balance is small, and it is not cost effective to prepare the account and pay the filing fee for filing the petition. Therefore the petitioner asks the Court to dispense with further accountings. Notice of With future accountings because all funds are in a blocked account and cannot be withdrawn without a court order, so the court is aware of all withdrawals. The account and pay the filing fee for filing the petition. Therefore the petitioner asks the Court to dispense with further accountings. 1. Need Order. Local Rule 7. a proposed Order shall be submitted with all pleading request relief. If the propose order is not received in the Probate Filing Clerk's Office (10) days before the schedule.	in Court
 ✓ Notice of Hrg ✓ Aff.Mail ✓ Aff.Mail ✓ Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen ✓ Letters Duties/Supp Winn folde accountings because all folds are in a blocked account and cannot be withdrawn without a court order, so the court is aware of all withdrawals. The account balance is small, and it is not cost effective to prepare the account and pay the filing fee for filing the petition. Therefore the petitioner asks the Court to dispense with further accountings. I. Need Order. Local Rule 7. a proposed Order shall be submitted with all pleading request relief. If the propose order is not received in the Probate Filing Clerk's Office (10) days before the scheden. 	
Hrg withdrawn without a court order, so the court is aware of all withdrawals. The account balance is small, and it is not cost effective to prepare the account and pay the filing fee for filing the petition. Therefore the petitioner asks the Court to dispense with further accountings. Valie Val	niner
 ✓ Aff.Mail ✓ Aff.Mail ✓ Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen ✓ Letters Duties/Supp Minute Order of 05/02/2016: Example to account is aware of all withdrawals. The account and pay the filing the petition. Therefore the petition. Therefore the petitioner asks the Court to dispense with further accountings. Minute Order of 05/02/2016: Example to support the school of the provided in open court. Need Order. Local Rule 7. a proposed Order shall be submitted with all pleading order is not received in the Probate Filing Clerk's Office (10) days before the school of the proposed order is not received in the Probate Filing Clerk's Office (10) days before the school of the proposed order is not received in the Probate Filing Clerk's Office (10) days before the school of the proposed order is not received in the Probate Filing Clerk's Office (10) days before the school of the proposed order is not received in the Probate Filing Clerk's Office (10) days before the school of the proposed order is not received in the Probate Filing Clerk's Office (10) days before the school of the proposed order is not received in the Probate Filing Clerk's Office (10) days before the school of the proposed order is not received in the Probate Filing Clerk's Office (10) days before the school of the proposed order is not received in the Probate Filing Clerk's Office (10) days before the school of the proposed order is not received in the Probate Filing Clerk's Office (10) days before the school of the proposed order is not received in the Probate Filing Clerk's Office (10) days before the school of the proposed order is not received in the Probate Filing Clerk's Office (10) days before the school of the proposed order is not received in the proposed order in the proposed order is not received in the proposed order in the proposed order in the proposed order in the proposed order in t	niner
Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen ✓ Letters 5/20/14 Duties/Supp account balance is small, and it is not cost effective to prepare the account and pay the filing fee for filing the petition. Therefore the petitioner asks the Court to dispense with further accountings. 1. Need Order. Local Rule 7. a proposed Order shall be submitted with all pleading request relief. If the proposed order is not received in the Probate Filing Clerk's Office (10) days before the scheduling that is not cost effective to prepare the account and pay the filing fee for filing the petition. Therefore the petitioner asks the Court to dispense with further accountings.	III ICI
Sp.Ntc. Pers.Serv. Conf. Screen Letters 5/20/14 Duties/Supp effective to prepare the account and pay the filing fee for filing the petition. Therefore the petitioner asks the Court to dispense with further accountings. 1. Need Order. Local Rule 7. a proposed Order shall be submitted with all pleading request relief. If the proposed order is not received in the Probate Filing Clerk's Office (10) days before the scheduling the petition. Therefore the petition are proposed order in the proposed order is not received in the Probate Filing Clerk's Office (10) days before the scheduling the petition. Therefore the petition are proposed order shall be submitted with all pleading order is not received in the Probate Filing Clerk's Office (10) days before the scheduling the petition are proposed order. Local Rule 7. a proposed order shall be submitted with all pleading order is not received in the Probate Filing Clerk's Office (10) days before the scheduling the petition are proposed order. Local Rule 7. a proposed order shall be submitted with all pleading order is not received in the Probate Filing Clerk's Office (10) days before the scheduling the petition are proposed order. Local Rule 7. a proposed order shall be submitted with all pleading order is not received in the Probate Filing Clerk's Office (10) days before the scheduling the petition are proposed order. The proposed order is not received in the Probate Filing Clerk's Office (10) days before the scheduling the petition are proposed order. The proposed order is not received in the proposed order is not received in the proposed order. The proposed order is not received in the proposed order is not received in the proposed order.	
Sp.Ntc. the filing fee for filing the petition. Therefore the petitioner asks the Court to dispense with further accountings. 1. Need Order. Local Rule 7. a proposed Order shall be submitted with all pleading request relief. If the proposed order is not received in the Probate Filing Clerk's Office (10) days before the schedule.	
Conf. Screen ✓ Letters 5/20/14 Duties/Supp with further accountings. submitted with all pleading request relief. If the propose order is not received in the Probate Filing Clerk's Office (10) days before the sched	states
Screen Continued with all pleading request relief. If the propose order is not received in the Probate Filing Clerk's Office (10) days before the schedule.	
✓ Letters 5/20/14 order is not received in the Probate Filing Clerk's Office (10) days before the schedule.	ıs that
Duties/Supp Probate Filing Clerk's Office (10) days before the sched	ed
(10) days before the scher	
LIUL days perore the sched	
Video hearing, a continuance m	ay be
Receipt required.	
CI Report	
9202	
Order X	
Aff. Posting Reviewed by: L∨	
Status Rpt Reviewed on: 07/12/2016	
UCCJEA Updates:	
Citation Recommendation:	
FTB Notice File 6A- Graff	

6A

6B Jade Dylon Graff (CONS/P)

Case No. 14CEPR00171

Petitioner Sovern, Sharon Kaye (Pro Per – Conservator - Maternal Grandmother)
Order to Show Cause

Age: 20 DOB: 02/28/1996	SHARON KAYE SOVERN, Grandmother was appointed Conservator of the Person and Estate without bond (funds	NEEDS/PROBLEMS/COMMENTS:
	blocked) on 05/20/2014. Letters issued on 05/20/2014	
Cont. from	2011013 133000 011 00/20/2011	
Aff.Sub.Wit.	Receipt for Blocked Account in the	
Verified	amount of \$15,090.00 was filed	
Inventory	06/13/2014.	
PTC	Final Inventory and Appraisal filed	
Not.Cred.	06/16/2014 shows an estate valued at	
Notice of	\$15,090.00.	
Hrg		
Aff.Mail	Minute Order of 06/13/2016 set this	
Aff.Pub.	Order to Show Cause. Minute Order states: NO APPEARANCES	
Sp.Ntc.	= – The Court issues an Order to Show	
Pers.Serv.	Cause to Sharon Kaye Sovern as to why	
Conf.	she should not be removed as	
Screen	Conservator for her failure to file	
Letters	amended accounting as mentioned in the examiner notes. Ms. Sovern is	
Duties/Supp	ordered to be personally present in Court on 07/18/2016.	
Objections		
Video		
Receipt	Court Certificate of Mailing indicates	
CI Report	that a copy of the minute order was mailed to Sharon Kaye Sovern on	
9202 Order	06/13/2016.	
Aff. Posting	30, 10, 2010.	Reviewed by: LV
Status Rpt	-	Reviewed by: EV Reviewed on: 07/12/2016
UCCJEA	-	Updates:
Citation	1	Recommendation:
FTB Notice		File 6B- Graff

6B

7 Felipe Barajas Gutierrez (Estate)

Case No. 14CEPR00746

Attorney: H. Ty Kharazi (for Administrator - Yesenia Torres Fajardo)

Waiver of Accounting and Petition for Final Distribution and for Allowance of Statutory Attorney's Fees

DO	D: 6/3/2014		YESENIA TORRES FAJARDO,	NEEDS/PROBLEMS/COMMENTS:
, ,			spouse/administrator, is petitioner.	, ,
			Accounting is waived by sole heir Decedent died intestate, leaving four	1. Need order.
Co	nt. from		adult children and a surviving spouse. The	
	Aff.Sub.Wit.		four children assigned their interest to the surviving spouse, resulting in her now	
✓	Verified		being the sole heir of decedent's estate.	
√	Inventory		I&A - \$120,000.00	
✓	PTC		(no cash)	
	Not.Cred.		Administrator - waives	
✓	Notice of			
	Hrg	/	Attorney - \$4,600.00	
✓	Aff.Mail	w/	(statutory)	
	Aff.Pub.			
	Sp.Ntc.		Distribution, pursuant to intestate	
	Pers.Serv.		succession and assignments of interest,	
	Conf.		is to:	
	Screen	4	Yesenia Torres Fajardo – 100% interest in	
	Letters 11/5/1	4	real property located at 715 Peach,	
	Duties/Supp		Mendota, Fresno County, CA	
	Objections			
	Video Receipt			
	CI Report			
1	9202			
	Order	Χ		
	Aff. Posting			Reviewed by: SEF
	Status Rpt			Reviewed on: 7/12/2016
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 7- Gutierrez

8 Ronald F. Smith (Estate)

Case No. 14CEPR00856

Attorney Hiyama, Dean (for Clark Smith – Administrator – Petitioner)

First and Final Report of Administrator on Waiver of Account and Petition for Allowance of Compensation to Attorney for Ordinary Services and for Final Distribution

DC	D: 09/11/2014	CLARK SMITH, Administrator, is	NEEDS/PROBLEMS/COMMENTS:
		petitioner.	
		1, , ,	Note: Attorney Motsenbocker
		Accounting is waived	represented the Administrator from
Cont. from		I&A - \$6,881,365.08	the initial filing of the Probate Estate 09/17/2014 until 04/7/2015 and is
	Aff.Sub.Wit.	POH - \$6,604,265.78 (\$9,132.89 is cash)	entitled to a portion of the Attorney
1	Verified	1	Fees. Mr. Hiyama has proposed that
		Executor- Waives	Mr. Motsenbocker receive
✓	Inventory		\$13,090.18. Court may require
	PTC	Attorney - \$64,450.92 (allocated	notice to Attorney Motsenbocker's estate or next of kin.
✓	Not.Cred.	\$52,360.74 to Attorney Dean Hiyama and \$13,090.18 to former Attorney G.L.	esicie di nexi di kin.
✓	Notice of	Motsenbocker)	
	Hrg	Closing - \$2,000.00	
✓	Aff.Mail w/		
	Aff.Pub.	Distribution pursuant to intestate	
	Sp.Ntc.	succession:	
	Pers.Serv.	Clark Smith - \$7,132.89; various real	
	Conf.	property totaling \$6,595,132.89.	
	Screen	4 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	
✓	Letters 10/27/14		
	Duties/Supp		
	Objections		
	Video		
	Receipt	=	
	CI Report	=	
√	9202		
	Order		
	Aff. Posting		Reviewed by: LV
	Status Rpt		Reviewed on: 07/14/2016
	UCCJEA		Updates:
	Citation		Recommendation:
✓	FTB Notice		File 8- Smith

9 Carol Green (Estate)

Case No. 14CEPR01009

Attorney Horton, Lisa (for Linda Green – Executor)

Probate Status Hearing RE: Filing of the First or Final Account

DOD: 12/03/2013	LINDA GREEN, daughter, was appointed	NEEDS/PROBLEMS/COMMENTS:
	Executor with full IAEA authority without bond	
	on 01/07/2015.	Minute Order of 05/16/2016: Ms. Walters
	L - H 01 /07 /001 5	represents that they are awaiting
Cont. from 030716,	Letters issued on 01/07/2015.	liquidation of the US savings bonds.
051616	Partial Inventory and Appraisal No. 1 filed	
Aff.Sub.Wit.	05/12/2015 shows an estate valued at	Need First Account or Petition for
Verified	\$103,200.30.	Final Distribution or current written
Inventory		status report pursuant to Local
PTC	Final Inventory and Appraisal filed 07/07/2015	Rule 7.5 which states in all
Not.Cred.	shows an estate valued at \$14,241.17.	matters set for status hearing
Notice of	Minute Order of 01/07/2015 set this matter for	verified status reports must be
Hrg	the filing of the Inventory and Appraisal.	filed no later than 10 days before
Aff.Mail		the hearing. Status Reports must
Aff.Pub.	Status Hearing Report filed 03/03/2016 (for	comply with the applicable
Sp.Ntc.	03/07/2016 hearing) states the decedent's	code requirements. Notice of
Pers.Serv.	residence sold, and her savings bonds have	the status hearing, together with
Conf.	been sent off to the Treasury to be liquidated	a copy of the Status Report shall
Screen	and are awaiting funds to be directly deposited into the estate account. The last	be served on all necessary
Letters	remaining issue is the set up for the scholarship	parties.
Duties/Supp	at San Jose State per the Decedent's will. The	'
Objections	Decedent stated in her will that the	
Video	scholarship was to go to a woman, but state	
Receipt	universities are prohibited under Prop 29 from	
CI Report	having specific criteria on the basis of age, gender, ethnicity or race. Attorney Horton	
9202	has been working with the Associate Vice	
Order	President of Development at San Jose State	
Aff. Posting	to fix this issue so that the gift to San Jose State	Reviewed by: LV
Status Rpt	would not lapse. The beneficiaries of the	Reviewed on: 07/12/2016
UCCJEA	estate have all agreed and will sign a formal	Updates:
Citation	 Agreement to modify the requirements of the scholarship so that it would not be prohibited, 	Recommendation:
FTB Notice	but Attorney Horton is in the process of getting	File 9- Green
	the agreement language approved by San	
	Jose State before everyone can sign. This will	
	be the last thing needed for the final	
	accounting and petition for distribution, as the	
	estate cannot be closed until the agreement	
	is signed. Ms. Horton asks that this matter be continued	
	out for 60 days for further status.	
	got to do days for form or states.	

10A Amarrisa Kozorra, Krysta Kozorra (GUARD/P) Case No. 15CEPR00678

Petitioner Verduzco, Joaquin (Pro Per – Step-Father)

Attorney Lovegren-Tipton, Amy R. (for Sandra Kozorra – Objector -Maternal Grandmother)

Petition for Appointment of Guardianship of the Person

Amarrisa Age: 13	TEMPORARY EXPIRES 07/18/2016	NEEDS/PROBLEMS/COMMENTS:
Krysta Age: 11	JOAQUIN VERDUZCO, step-father, is petitioner.	<u>Page 10B</u> is consideration of the Stipulation and Proposed Order Regarding Visitation with Sandra Kozorra.
Cont. from 091415, 110215, 120715, 020116, 041816 Aff.Sub.Wit.	Please see petition for details	Minute Order of 04/18/2016: The Court again admonishes that ICWA paperwork must be completed and returned to the clerk's office. The Court directs the clerk to mail the blank ICWA forms to Ms. Tipton.
Inventory PTC Not.Cred.		Clerk's Certificate of mailing indicates blank ICWA forms were mailed to Attorney Tipton on 04/18/2016.
✓ Notice of Hrg ✓ Aff.Mail W/		Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent
Aff.Pub. Sp.Ntc. Pers.Serv. × Conf.		 and waiver of notice for: Jason Ray Boulware (Father of Amarissa), if Court does not find due diligence per Declaration filed
Screen ✓ Letters		4/14/2016. 2. Need proof of service fifteen (15) days
✓ Duties/Supp Objections Video		prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent
Receipt ✓ CI Report		 and waiver of notice or declaration of due diligence for: Paternal Grandparents (of Amarissa) – Unknown
9202 ✓ Order		Continued on additional page 2
Aff. Posting		re:needs/problems/comments Reviewed by: LV
Status Rpt UCCJEA		Reviewed by: EV Reviewed on: 07/14/2016 Updates:
Citation FTB Notice		Recommendation: File 10A - Kozorra

10A(additional page 2) Amarrisa Kozorra, Krysta Kozorra (GUARD/P) Case No. 15CEPR00678

NEEDS/PROBLEMS/COMMENTS continued:

- 3. UCCJEA is incomplete. Need minors' residence information for the past 5 years.
- 4. Page #5 of the Guardianship Petition Child Information Attachment (GC 210(CA)) which pertains to whether the children have Native American Ancestry was not completed. Need declaration with page #5 attached for each of the minors.
- 5. Pursuant to the Minute Order of 02/01/2016, Deena Kozorra indicated that Krysta has Native American Ancestry therefore, a Notice of Child Custody Proceeding for Indian Child (Form ICWA-030), must be served together with copies of petition and all attachments, including this form, on the child's parent; any Indian custodian; any Indian tribe that may have a connection to the child; the Bureau of Indian Affairs (BIA), and possibly the U.S. Secretary of the Interior, by certified or registered U.S. Mail, return receipt requested. (Please see Probate Code 1460.2, and CA Rules of Court 7.1015)
- Per item 5 above, Petitioner will need to return the completed copy of the Notice of Child Custody Proceeding for Indian Child to the probate clerk. The probate clerk will then mail the notice to the required agencies as required.
- 7. After mailing, per item 6 above, need proof of service of notice, including copies of the notices sent and all return receipts and responses received, pursuant to Probate Code 1460.2(d).

10B Amarrisa Kozorra and Krysta Kozorra (GUARD/P) Case No. 15CEPR00678

Attorney Petitioner Amy R. Lovegren-Tipton (for Objector Sandra Kozorra, maternal grandmother)
Joaquin Verduzco (Pro Per Petitioner, step-father)

Stipulation and Proposed Order Regarding Visitation of Minor Children with Sandra Kozorra

	narrisa Age: 13	JOAQUIN VERDUZCO, step-father, filed a Petition for	NEEDS/PROBLEMS/
Kry	vsta Age: 11	Appointment of Guardian on 7/14/2015.	COMMENTS:
	ont. from 041816	SANDRA KOZORRA, maternal grandmother, filed Objections on 11/12/2015.	Continued from 07/18/2016
	Aff.Sub.Wit.	Minute Order dated 2/1/2016 from the last hearing states, in	
	Verified	pertinent part: Sandra Kozorra withdraws her objection. Counsel	
	Inventory	represents that parties have reached an agreement, and the	
	PTC	Court orders that any agreement is to be reduced to writing,	
	Not.Cred.	filed with the Court, and properly served.	
	Notice of	Stipulation and Proposed Order Regarding Visitation of	
	Hrg	Minor Children with Sandra Kozorra was filed 4/13/2016,	
1	Aff.Mail	seeking the Court's approval and signature on the	
	Aff.Pub.	proposed Order Regarding Visitation of Minor Children with Sandra Kozorra.	
	Sp.Ntc.	wiiii Sanara Rozoira.	
	Pers.Serv.	Order on the Stipulation filed 4/13/2016 finds the	
	Conf.	Stipulation will be considered at the hearing on 4/18/2015,	
	Screen	as approval and signature on the Stipulation is premature	
	Letters	given that a general guardianship is not yet established.	
	Duties/Supp	Stipulation contains the following orders:	
	Objections	Lipon signing of the [Order Pagarding Visitation of	
	Video	 Upon signing of the [Order Regarding Visitation of Minor Children with Sandra Kozorra], SANDRA KOZORRA, 	
<u> </u>	Receipt	the maternal grandmother of the children, shall have	
 	CI Report	telephone visitation with the children as agreed upon	
H	9202	by the parties, but no less than twice per week for a	
✓	Order	period of 15 minutes at a time;	
	Aff. Posting	SANDRA KOZORRA shall have visitation with the children	Reviewed by: LEG (LV for 07/18/16)
	Status Rpt	each summer for a period of 8 consecutive weeks at	Reviewed on:
		SANDRA KOZORRA'S residence in Arizona, starting the	07/14/2016
	UCCJEA	Monday after school lets out;	Updates:
	Citation	Transportation for the visitation shall be as agreed upon by	Recommendation:
	FTB Notice	the parties.	File 10B- Kozorra

10B

Case No. 15CEPR00755

11 Raven Inci-Francois (GUARD/P) Case No. 15C Attorney Hopper, Cindy J (for Heather Rule and Kevin Rule – Petitioners – Guardians) **Petition for Termination of Guardianship**

Ag	e: 15		HEATHER RULE, and KEVIN RULE, co-	NEEDS/PROBLEMS/COMMENTS:
			guardians/paternal aunt and uncle, are	
			petitioners.	
			Please see petition for details	
Со	nt. from			
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	w/		
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.	w/		
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			Reviewed by: LV
	Status Rpt			Reviewed on: 07/14/2016
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 11- Inci-Francois

11

Attorney

Matlak, Steven M. (for Co-Executors)

Petition for Order Approving Settlement Agreement

DO	D: 6/20/15		MIKE J. KOCHERGEN and ANN J. SHUKEN,	NEEDS/PROBLEMS/
			Co-Executors, are Petitioners.	COMMENTS:
	Aff.Sub.Wit.		Petitioners state at the time of the decedent's death, there was ongoing litigation on appeal. The decedent was named individually, but died during the litigation on 6/20/15.	
>	Verified Inventory PTC		Britz, Inc. filed a creditor's claim pertaining to the litigation on 11/2/15.	
> >	Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc.	W	The parties to the litigation, John A. Kochergen Properties, Inc. aka J.A. Kochergen Properties Inc., Petitioners, Kettlemen Farms, Inc., and David Britz, Martin Britz, Linda Britz-Glassman and Britz, Inc. (herein Britz) have reached settlement agreement that will resolve the litigation and discharged the creditor's claim.	
	Pers.Serv. Conf. Screen Letters Duties/Supp		See petition for terms of settlement agreement, attached at Exhibit A. Enforceability is contingent upon approval of this Court pursuant to Probate Code §9837.	
\	Objections Video Receipt CI Report 9202 Order		The advantage to the estate is that the settlement agreement will fully resolve the claims of all parties and, except for attorney fees and costs through settlement, the parties will avoid time, expense, and uncertainty of continued litigation. Petitioners have fully investigated their respective claims,	
	Aff. Posting Status Rpt UCCJEA Citation FTB Notice		sought advice of counsel (Dowling Aaron Incorporated), and determined it is not in the best interest of the estate to continue the litigation. Therefore, Petitioners request the Court approve the proposed settlement.	Reviewed by: skc Reviewed on: 7/13/16 Updates: Recommendation: File 12- Kochergen
			Petitioners pray for an order approving the proposed settlement agreement and mutual release of all claims by John A. Kochergen Properties, Inc., aka J.A. Kochergen Properties, Inc., Petitioners, Kettlemen Farms, Inc., and David and David Britz, Martin Britz, Linda Britz-Glassman, and Britz, Inc., a true and correct copy of which is attached as Exhibit A.	

Attorney Gary G. Bagdasarian (for Petitioners Joaquin Garcia and Jose Garcia, Co-Administrators)

Waiver of Accounting and Report of Co-Administrators and Petition for Its Settlement; Waiver of Co-Administrators' Commissions; Waiver of Attorney's Fees and for Final Distribution

DC	DD: 2/20/2015	JOAQUIN GARCIA and JOSE GARCIA, sons and Co-Administrators, are Petitioners.	NEEDS/PROBLEMS/COMMENTS:
		Accounting is waived.	
Co √	Aff.Sub.Wit.	I & A — \$50,400.00 POH — \$50,400.00 (no cash)	
✓	Inventory	Administrators— waive	
√ √	PTC Not.Cred.	Attorney — waives	
√	Notice of Hrg	Distribution pursuant to intestate succession and Assignments of Interest is to:	
✓	Aff.Mail V	/	
	Aff.Pub.	 JOAQUIN GARCIA – an undivided ½ interest in real property, and two 	
✓	Sp.Ntc.	motorcycles;	
	Pers.Serv.	JOSE GARCIA- an undivided ½ interest in	
	Conf. Screen	real property, and two motorcycles.	
	Letters 10071		
	Duties/Supp		
	Objections	_	
	Video Receipt		
	CI Report		
✓	9202		
✓	Order		
	Aff. Posting		Reviewed by: LEG
	Status Rpt		Reviewed on: 7/14/16
	UCCJEA	_	Updates:
1	Citation FTB Notice		Recommendation: SUBMITTED File 13- Garcia
Ĺ			

14 Kenneth Scott Davis (Estate)

Case No. 15CEPR01007

Attorney: Mark S Poochigian (for Administrator Megan Davis)

Probate Status Hearing RE: Filing of the Inventory and Appraisal

	The state of the first state of	F
DOD: 9/16/2015	MEGAN DAVIS, daughter, was	NEEDS/PROBLEMS/COMMENTS:
	appointed Administrator with full IAEA	
	without bond on 11/16/2015.	
	=	OFF CALENDAR. Order dated
Card from 04101/	Letters issued 11/16/2015.	7/8/16 continued the matter to
Cont. from 041816		11/21/16.
Aff.Sub.Wit.	Minute order dated 11/16/2015 set this	
Verified	status hearing re: the filing of the	 Need inventory and appraisal.
Inventory	inventory and appraisal.	
PTC		
Not.Cred.		
Notice of	7	
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.	7	
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 7/8/16
UCCJEA		Updates:
Citation	<u></u>	Recommendation:
FTB Notice		File 14- Davis

14

15 Marie-Louise Pollastrini (Estate)

Attorney: Dean Hiyama (for Gary D. F. Pollastrini – Executor)

Case No. 15CEPR01192

Probate Status Hearing RE: Filing of the Inventory and Appraisal

DC	D: 11/14/2015		GARY D. F. POLLASTRINI, son, was	NE	EDS/PROBLEMS/COMMENTS:
			appointed executor with full IAEA		
			without bond on 1/12/2016.		nute order dated 6/13/2016 ontinued matter to 7/18/2016.
Со	nt. from 06131	6	Letters issued 1/12/2016.	1.	Need inventory and appraisal.
	Aff.Sub.Wit.		Minute order dated 1/12/2016 set	2.	Status report filed 7/13/2016 is not verified by Gary D. F. Pollastrini,
	Inventory	Χ	this status hearing for filing of the inventory and appraisal.		Executor, pursuant to Probate Codes 1020 and 1023.
	PTC Not.Cred.		Status report filed 7/13/2016 states	3.	Need proof of service of status report on all interested parties
	Notice of Hrg		since the last status report, the probate referee has reviewed and		pursuant to Local Rule 7.5.
	Aff.Mail	Х	made his appraisal. A copy of the		
	Aff.Pub.		appraisal was forwarded to the		
	Sp.Ntc.		executor for approval; however, the		
	Pers.Serv.		executor is contesting the appraisal		
	Conf.		of certain assets. Counsel requests a		
	Screen		30-day continuance to allow time to		
	Letters		file the final I&A.		
	Duties/Supp				
	Objections				
	Video				
-	Receipt				
-	CI Report				
	9202				
	Order			P.c	viewed by: SEE
	Aff. Posting Status Rpt				eviewed by: SEF
✓	•				
	UCCJEA				odates:
	Citation			_	commendation:
	FTB Notice			File	e 15- Pollastrini

15

Attorney

16

Durost, Linda K. (for Amalia Alvarez – Mother – Guardian of the Estate)

Status RE: Receipt for Blocked Account

		AMALIA ALVAREZ, Mother, was	NEEDS/PROBLEMS/COMMENTS:
		appointed Guardian of the Estate on 4/4/16 with bond of \$422,400.00 and all funds placed into a blocked account.	Minute Order 6/13/16: Funds must be deposited in a blocked account. The Court does not order a bond at this time.
	ont. from 051616, 1316		N. I. I. II
00	Aff.Sub.Wit.	Note: Bond has not been filed and Letters have not yet issued.	Note: Letters issued 6/21/16.
	Verified	Letters thave that yet issued.	The following issue remains noted:
	Inventory	Minute Order 4/4/16 states: The	3
	PTC	Court orders funds be placed into a	Need receipt for blocked account
	Not.Cred.	blocked account upon receipt. This	(MC-356) or written status report per
	Notice of	Court would be open to investment of the funds in the future, and	Local Rule 7.5.
	Hrg	would be looking for Counsel to	Note: Because the original order
	Aff.Mail	provide specifications/projections	required bond rather than blocking, it
	Aff.Pub.	with regard to the investment.	appears a separate Order to Deposit
	Sp.Ntc.	The Court also set this status hearing	Money Into Blocked Account will also be necessary. Need Order MC-355.
	Pers.Serv.	for the filing of the receipt for	be necessary. Need Order MC-333.
	Conf.	blocked account.	
	Screen		
	Letters		
	Duties/Supp		
	Objections	_	
	Video		
	Receipt	4	
	CI Report	4	
	9202 Order	-	
	Aff. Posting	┥	Reviewed by: skc
	Status Rpt	-	Reviewed by: 3RC
	UCCJEA	1	Updates:
	Citation	1	Recommendation:
	FTB Notice	<u> </u>	File 16- Walker

Durost, Linda K. (for Petitioner Amalia Alvarez)

Status RE: Receipt for Blocked Account

	/
Cont. from 051616,	- ^k
061316	1
Aff.Sub.Wit.	
Verified	
Inventory	
PTC	
Not.Cred.	֓֞֓֓֓֓֓֓֓֓֓֓֟֓֓֓֓֓֓֟֓֓֓֓֓֓֟֓֓֓֓֓֓֓֓֓֓֓
Notice of	
Hrg	
Aff.Mail	f
Aff.Pub.	
Sp.Ntc.	r
Pers.Serv.	
Conf.	(
Screen	†
Letters	┛.
Duties/Supp	□ 1
Objections	_
Video	7'
Receipt	
CI Report	
9202	
Order	
Aff. Posting	_
Status Rpt	_
UCCJEA	4
Citation	4
FTB Notice	

AMALIA ALVAREZ, Mother, was appointed Guardian of the Estate on 4/4/16 with bond of \$102,000.00 and all funds placed into a blocked account.

Note: Bond has not been filed and Letters have not yet issued.

Minute Order 4/4/16 states:

The Court orders that the funds be placed into a blocked account upon receipt. This Court would be open to investment of the funds in the future, and would be looking for Counsel to provide specifications/projections with regard to the investment. The issue of bond is taken under advisement by the Court. Counsel may provide additional justification regarding the support issue in this matter.

The Court also set this status hearing for the filing of the receipt for blocked account.

NEEDS/PROBLEMS/COMMENTS:

Minute Order 6/13/16: Funds must be deposited in a blocked account. The Court does not order a bond at this time.

Note: Letters issued 6/21/16.

The following issue remains noted:

 Need receipt for blocked account (MC-356) or written status report per Local Rule 7.5.

<u>Note</u>: Because the original order required bond rather than blocking, it appears a separate Order to Deposit Money Into Blocked Account will also be necessary. Need Order MC-355.

Reviewed by: skc

Reviewed on: 7/11/16

Updates:

Recommendation:

File 17- Abarca

18A Telena Garcia, Sophia Garcia, David Casarez and Victoria Casarez (GUARD/P)

Petitioner: David Mendez Casarez (Pro per)
Petitioner: Caroline Martinez Casarez (Pro per)

Objector: April Casarez (Pro per)

Petition for Appointment of Guardian of the Person

Petition for Appointment of Guardian of the Person			
	NO TEMPORARY – DENIED/DISMISSED	NEEDS/PROBLEMS/COMMENTS:	
Cont. from Aff.Sub.Wit.	DAVID M. CASAREZ and CAROLINE CASAREZ, paternal grandparents of David and Victoria, are petitioners.	Please see page 18B re: competing petition filed by Sophia Garcia and Odelia Garcia (mother and maternal grandmother).	
✓ Verified Inventory PTC Not.Cred. ✓ Notice of Hrg Aff.Mail Aff.Pub.	See petition for details.	Minute order dated 5/24/2016 from temporary hearing states Petitioner represents that David Casarez (father of David and Victoria) is in the Fresno County Jail as of [5/23/2016]. Parties report that minors were placed with Odelia Garcia [maternal grandmother] by	
Sp.Ntc. ✓ Pers.Serv. w ✓ Conf. Screen ✓ Letters		CPS. The Court orders that there shall be no unsupervised visits. The general hearing remains for 7/18/2016. See additional page.	
✓ Duties/Supp ✓ Objections			
Video Receipt ✓ CI Report	_		
9202 ✓ Order			
Aff. Posting Status Rpt ✓ UCCJEA		Reviewed by: SEF Reviewed on: 7/12/2016 Updates:	
Citation FTB Notice		Recommendation: File 18A- Garcia/ Casarez	

18A

Case No. 16CEPR00494

18A Telena Garcia, Sophia Garcia, David Casarez and Victoria Casarez (GUARD/P)

Page 2

Case No. 16CEPR00494

NEEDS/PROBLEMS/COMMENTS, continued:

Petitioner:

- 1. Need proof of personal service at least 15 days notice before the hearing, of the *Notice of Hearing or* consent and waiver of notice <u>or</u> declaration of due diligence for:
 - a. Talena and Sofia's father (listed as "unknown")
- 2. Need proof of service at least 15 days notice before the hearing, of the *Notice* of *Hearing* or consents and waiver of notice or declarations of due diligence for:
 - a. Talena and Sofia's paternal grandparents (listed as "unknown")

Objector:

- 1. Need proof of service of objections on the following:
 - a. David M. Casarez (petitioner)
 - b. Caroline Casarez (petitioner)

Telena Garcia, Sophia Garcia, David Casarez and 18B Victoria Casarez (GUARD/P)

Petitioner: April Garcia (Casarez) (Pro per) Petitioner: Odelia Garcia (Pro per)

Petition for Appointment of Guardian of the Person

	NO TEMPORARY REQUESTED	NEEDS/PROBLEMS/COMMENTS:
Cont. from Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of X Hrg Aff.Mail X Aff.Pub. Sp.Ntc. Pers.Serv. X Conf. Screen Letters Duties/Supp Objections Video	NO TEMPORARY REQUESTED APRIL GARCIA (CASAREZ) and ODELIA GARCIA, mother and maternal grandmother, are petitioners. See petition for details.	Minute order dated 5/24/2016 from temporary hearing states Petitioner represents that David Casarez (father of David and Victoria) is in the Fresno County Jail as of [5/23/2016]. Parties report that minors were placed with Odelia Garcia [maternal grandmother] by CPS. The Court orders that there shall be no unsupervised visits. The general hearing remains for 7/18/2016. See additional page.
Receipt ✓ CI Report		
9202		
✓ Order		
Aff. Posting Status Rpt		Reviewed by: SEF Reviewed on: 7/12/2016
✓ UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 18B - Garcia/ Casarez

18B

Case No. 16CEPR00494

18B Telena Garcia, Sophia Garcia, David Casarez and Victoria Casarez (GUARD/P)

Page 2

Case No. 16CEPR00494

NEEDS/PROBLEMS/COMMENTS, continued:

- 3. Need proof of personal service at least 15 days before the hearing of the *Notice* of *Hearing* or consent and waiver of notice or declaration of due diligence for:
 - a. Talena and Sofia's father (listed as "unknown")
 - b. David Casarez Jr. (David and Victoria's father) unless court dispenses with notice
- 4. Need proof of service at least 15 days notice before the hearing of the Notice of Hearing or consent and waiver of notice for:
 - a. David M. Casarez (David and Victoria's paternal grandfather)
 - b. Caroline Casarez (David and Victoria's paternal grandmother)
 - c. Talena and Sofia's paternal grandparents (listed as "unknown")
- 5. Need clarification of Odelia Garcia's current address.
- 6. Per item 3, above, if address has changed, need Notice of Change of Address (MC-040) and may need new Orders and Letters.

19 Adriana Vizcaino, Elvira Mendez (GUARD/P) Case No. 16CEPR00515

Petitioner: Jose Mendez (pro per)
Petitioner: Myda Batrez (pro per)

Petition for Appointment of Guardian of the Person

L			THERE IS NO TEADOR ABY	THERE IS NO TEADORARY NEEDS (PROPERAS (COMMENTS)			
			THERE IS NO TEMPORARY. No temporary was requested.	NEEDS/PROBLEMS/COMMENTS:			
-			No lemporary was requested.				
_			JOSE MENDEZ, maternal great-	Note: If the Court does not dispense			
Co	nt. from		grandfather and MYDA BATREZ,	with notice the will need proof of			
	Aff.Sub.Wit.		maternal aunt, are petitioners.	personal service of the Notice of			
1	Verified		Please see petition for details.	Hearing along with a copy of the Petition or consent and waiver of			
	Inventory		Court Investigator Report filed on	notice on:			
	PTC		7/6/16.	a. Unknown father of Adriana			
	Not.Cred.			b. Unknown father of Elvira			
1	Notice of			And proof service (either personal or			
	Hrg			by mail) of the Notice of Hearing			
	Aff.Mail			along with a copy of the Petition or			
	Aff.Pub.			consent and waiver of notice on:			
	Sp.Ntc.			a. Unknown paternal			
✓	Pers.Serv.	W/		grandparents of both Adriana and Elvira			
1	Conf.			b. Juan Heredia (maternal			
	Screen			grandfather)			
✓	Letters						
✓	Duties/Supp						
	Objections						
	Video						
	Receipt						
1	CI Report						
	9202						
1	Order						
	Aff. Posting			Reviewed by: KT			
	Status Rpt			Reviewed on: 7/13/16			
1	UCCJEA			Updates:			
	Citation			Recommendation:			
	FTB Notice			File 19- Vizcaino/ Mendez			

19

20 Angel Sifuentes (GUARD/P)

Petitioner: Maurice Garcia (Pro per)

Petition for Appointment of Guardian of the Person

Case No. 16CEPR00522

	NO TEMPORARY REQUESTED	NEEDS/PROBLEMS/COMMENTS:
		NEEDS, I ROBELMO, GOMMENTO.
	MAURICE GARCIA , stepfather, is petitioner	1. Need Notice of Hearing.
	permoner	2. Need proof of personal service
Cont. from		with at least 15 days notice of
Aff.Sub.Wit.	See petition for details.	Notice of Hearing with copy of petition or consents and waiver of
✓ Verified		notice <u>or</u> declarations of due
		diligence for:
Inventory PTC		a. Frank Sifuentes (father)
Not.Cred.		b. Angel Sifuentes (ward)
Notice of X		3. Need proof of personal service
Hrg		with at least 15 days notice of
Aff.Mail X		Notice of Hearing with copy of
Aff.Pub.		petition <u>or</u> consents and waivers of
Sp.Ntc.		notice <u>or</u> declarations of due diligence for:
Pers.Serv. X		a. Frank Sifuentes
✓ Conf.		(paternal grandfather)
Screen		b. Mary Sifuentes
✓ Letters		(paternal grandmother)
✓ Duties/Supp		c. Claurence Inskeep
Objections		(maternal grandfather)
Video		d. Maternal grandmother (listed as "unknown")
Receipt		e. Miracle Garcia (sibling) –
✓ CI Report		if 12 years or older
9202		f. Alicia Sifuentes (sibiling) –
✓ Order		if 12 years or older
Aff. Posting		Reviewed by: SEF
Status Rpt		Reviewed on: 7/13/2016
✓ UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 20- Sifuentes

20

Attorney: Paulette Janian (for Petitioner Jeffrey Kestly)

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under the IAEA

DOD: 5/29/16			JEFFREY KESTLEY, named executor	NEEDS/PROBLEMS/COMMENTS:
			without bond, is petitioner.	
			Full IAEA – o.k.	
Со	nt. from		Will datad: 4/05/02	Note: If the petition is granted,
	Aff.Sub.Wit.	S/P	Will dated: 4/25/03	status hearings will be set as
1	Verified		Residence: Selma	follows:
	Inventory		Publication: Selma Enterprise	
	PTC		'	Wednesday, January 4, 2017
	Not.Cred.			at 9:00 a.m. in Department 303, for the filing of the
	Notice of		Estimated value of the estate:	inventory and appraisal.
	Hrg		Personal property - 120,000.00	inversely and appraisan
✓	Aff.Mail	W/	Real property - \$130,000.00 Total - \$250,000.00	• Wednesday, September 27, 2017 at 9:00 a.m. in
✓	Aff.Pub.		γ200,000.00	Department 303, for the
	Sp.Ntc.			filing of the first account or
	Pers.Serv.		Probate Referee: Steven Diebert	petition for final distribution.
	Conf.			Pursuant to Local Rule 7.5 if the
	Screen			required documents are filed 10
✓	Letters			days prior the date set the
✓	Duties/Supp			status hearing will come off
	Objections			calendar and no appearance will be required.
	Video			
<u> </u>	Receipt			
_	CI Report			
 	9202			
✓	Order			
	Aff. Posting			Reviewed by: KT
	Status Rpt			Reviewed on: 7/14/16
	UCCJEA			Updates:
	Citation			Recommendation: SUBMITTED
	FTB Notice			File 21- Rossi

22 Martha Jane Torbit (Estate)

Petitioner: Jennifer Ann Waite (Pro per)

Case No. 16CEPR00597

Petition for Probate of Will and for Letters Testamentary

DOD: 5/10/2016			JENNIFER WAITE, named alternate	NEEDS/PROBLEMS/COMMENTS:	
			executor without bond, is petitioner	Need amended politics based	
			Declination to act filed by named executor, Stephen R. Henry.	Need amended petition based on, but not limited to the following:	
Co	nt. from	,	Full IAEA – need	1. Item 2c of petition is blank re: if	
✓ ✓	Aff.Sub.Wit.	s/p	Will dated 4/6/2013	petitioner is requesting full or limited IAEA authority.	
	Inventory		Residence: Fresno Publication: need	2. Per item 3e(2), there is no copy	
	PTC		Estimated value of Estate:	of decedent's will attached to the petition.	
	Not.Cred.		Personal property \$ 92,000.00	3. Item 3g is incomplete re: if	
	Notice of Ptn Admin	Х	Annual gross income: \$ 0.00 Real property: \$ 102,000.00	personal representative is a resident of California and the	
	Aff.Mail	Χ	Total: \$ 200,000.00	United States.	
	Aff.Pub. Sp.Ntc.	Х		4. Item 8 of petition does not list the following:	
	Pers.Serv.		Probate Referee: Rick Smith	a. Jennifer Waite (petitioner)	
	Conf.			b. Friends of Community Church	
	Screen			(contingent beneficiary)	
	Letters	Х		c. Stephen R. Henry (executor)	
	Duties/Supp	Х		5. Need Duties and Liabilities.	
	Objections Video			Need Confidential Supplement to Duties and Liabilities.	
	Receipt			7. Need Notice of Petition to Administer Estate.	
	CI Report 9202			8. Need proof of service of Notice	
	Order Order	Х		of Petition to Administer Estate on:	
				a. Robert Hays	
				b. Sue Hays	
				c. Friends of Community Church	
				d. Stephen R. Henry	
				e. Gini Richardson	
				See additional page.	
	Aff. Posting			Reviewed by: SEF	
	Status Rpt			Reviewed on: 7/14/2016	
	UCCJEA			Updates:	
	Citation			Recommendation:	
	FTB Notice			File 22- Torbit	
	22				

22 Martha Jane Torbit (Estate) Page 2

Case No. 16CEPR00597

NEEDS/PROBLEMS/COMMENTS, continued:

- 9. Need proof of publication.
- 10. Need Orders.
- 11. Need Letters.

Note: If granted, the Court will set status hearings as follows:

- Tuesday, December 13, 2016 for filing Inventory and Appraisal
- Tuesday, September 19, 2017 for filing the first account or petition for final distribution

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.

Attorney: Heather H. Kruthers (for Petitioner Public Guardian)

Petition for Appointment of Probate Conservator of the Person and Estate

			Townsers Expires 7/19/14	
			Temporary Expires 7/18/16	NEEDS/PROBLEMS/COMMENTS:
			PUBLIC GUARDIAN is petitioner Please see petition for details.	Court Investigator Advised Rights on 7/7/16.
Co	nt. from		riedse see permerrier derails.	
√	Aff.Sub.Wit.		Court Investigator Report filed on	Petition lists the son as <u>David</u> Yewdall. Notice of Hearing
	Inventory PTC		7/12/16	shows notice sent to <u>Davis</u> Yewdall. Need clarification.
-	Not.Cred.			2. Need Capacity Declaration re:
1	Notice of Hrg			medical consent powers.
1	Aff.Mail	W/		
	Aff.Pub.			Note: If the petition is granted, status
	Sp.Ntc.			hearings will be set as follows:
	Pers.Serv. Conf. Screen			Wednesday, November 16, 2016 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal.
✓	Letters			Wednesday, September 27, 2017
	Duties/Supp Objections			at 9:00 a.m. in Department 303, for the filing of the first account.
	Video Receipt			Pursuant to Local Rule 7.5 if the required documents are filed 10
✓	CI Report			days prior the date set the status
	9202			hearing will come off calendar and no appearance will be required.
✓	Order			The appearance will be required.
	Aff. Posting			Reviewed by: KT
	Status Rpt			Reviewed on: 7/13/16
	UCCJEA			Updates:
✓	Citation			Recommendation:
	FTB Notice			File 23- Yewdall

23

Attorney: Heather H. Kruthers (for Petitioner Public Guardian)

Petition for Appointment of Probate Conservator of the Person and Estate

			Temporary Expires 7/18/16	NEEDS/PROBLEMS/COMMENTS:
			Temporary Expires 7/10/10	14LLD3/1 ROBLEMS/ COMMENTS.
			PUBLIC GUARDIAN is petitioner	Court Investigator Advised Rights on 7/7/16.
_			Please see petition for details.	
Co	nt. from			
√	Aff.Sub.Wit. Verified		Court Investigator Report filed on 7/12/16	3. Petition lists the son as <u>David</u> Yewdall. Notice of Hearing shows notice sent
	Inventory PTC			to <u>Davis</u> Yewdall. Need clarification.
	Not.Cred.			Giaimeaneri.
1	Notice of Hrg			Need Capacity Declaration re: medical consent
✓	Aff.Mail	W/		powers.
	Aff.Pub.			
	Sp.Ntc.			Note: If the petition is granted,
	Pers.Serv.			status hearings will be set as follows:
	Conf.			
	Screen			 Wednesday, November 16, 2016 at 9:00 a.m. in
✓	Letters Duties (Supp			Department 303, for the filing of the inventory and
	Duties/Supp Objections			appraisal.
	Video			Wednesday, September 27,
	Receipt			2017 at 9:00 a.m. in
✓	CI Report			Department 303, for the filing of the first account.
	9202			Pursuant to Local Rule 7.5 if the
√	Order			required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.
	Aff. Posting			Reviewed by: KT
	Status Rpt			Reviewed by: N
	UCCJEA			Updates:
1	Citation			Recommendation:
	FTB Notice			File 24- Yewdall

25 Tierney Nicole Cooper-McCann (Estate) Case No. 16CEPR00608

Attorney: Gary G. Bagdasarian

Petition for Letters of Administration. Authorization to Administer under the Independent Administration of Estates Act

DOD: 5/7/14			IOUNIC COOPER father is notificate	NEEDS/PROBLEMS/COMMENTS:
DOD: 5/7/16			JOHN C. COOPER, father, is petitioner	NEEDS/PROBLEMS/COMMENTS:
			and requests appointment as	1 Na a decembra a filo a a diferenta Danca
			Administrator without bond.	Need waiver of bond from Dave
				Thomas McCann, surviving
	nt from		Full IAEA – o.k.	spouse or bond set at \$170,000.
Co	nt. from			
	Aff.Sub.Wit.		Decedent died intestate.	
1	Verified			
		<u> </u>	Residence: Clovis	Note: If the petition is granted, status
	Inventory		Publication: Fresno Business Journal	hearings will be set as follows:
	PTC			
	Not.Cred.		Estimated value of the estate:	Wednesday, August 17, 2016 at
	Notice of		Personal property - \$20,000.00	9:00 a.m. in Department 303, for
	Hrg		<u>Real property</u> - <u>\$150,000.00</u>	the filing of the bond, if required.
	Aff.Mail	W/	Total - \$170,000.00	
✓	All.Mall	٧٧/		Wednesday, January 4, 2017 at
1	Aff.Pub.			9:00 a.m. in Department 303, for
Ľ			Probate Referee: Steven Diebert	the filing of the inventory and
	Sp.Ntc.			appraisal.
	Pers.Serv.			' '
	Conf.			Wednesday, September 27, 2017
	Screen			at 9:00 a.m. in Department 303,
	Letters			for the filing of the first account or
✓	reliels			petition for final distribution.
1	Duties/Supp			
Ě				Pursuant to Local Rule 7.5 if the
	Objections			required documents are filed 10
	Video			days prior the date set the status
	Receipt			hearing will come off calendar and
	CI Report			no appearance will be required.
	9202			
-	Order			
✓	Oluei			
	Aff. Posting			Reviewed by: KT
	Status Rpt			Reviewed on: 7/14/16
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 25- Cooper-McCann
<u> </u>	1 IB NOIICE]		The 25- Cooper-McCallii

Petitioner Anthony Quinn Crozier (Pro Per, nephew)

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under the IAEA

DOD: 1/28/2016			ANTHONY QUINN CROZIER, nephew,	NEEDS/PROBLEMS/COMMENTS:		
			and named Executor without bond, is			
			Petitioner.	Note: The assets of the estate have		
				already been appraised as		
Cont. from			Full IAEA: Need Publication	indicated by the Final Inventory		
	Aff.Sub.Wit.	S/P	ruiliaea. Need Publication	and Appraisal filed 6/9/2016, which		
	Verified	3/1		indicates that RICK P. SMITH ,		
\	verilled		Will Dated: 10/9/1995	appraised the property. Pursuant to		
1	Inventory		2 6.1 6 6.1	the Court's policy STEVEN DEIBERT		
H	PTC			would be the designated Probate		
-			Residence: Fresno	Referee for this matter. Therefore,		
	Not.Cred.			Court may designate RICK P. SMITH		
✓	Notice of		Publication: Need Publication	as the Probate Referee for this case		
	Hrg			pursuant to Probate Code § 8902		
✓	Aff.Mail	W/		based on the appraisal work		
	Aff.Pub.	Χ	Inventoried Value of the Estate:*	having already been completed		
	Sp.Ntc.		Real property - \$100,000.00	by him.		
	Pers.Serv.		<u>Personal property</u> - \$ 2,216.78	Need Affidavit of Publication		
	Conf.		Total - \$102,216.78	pursuant to Probate Code §§		
	Screen		*The estate has already been	8120 – 8124, and Local Rule 7.9.		
1	Letters		appraised by Probate Referee Rick			
Ě	D 11 /6		Smith.	~Please see additional page~		
✓	Duties/Supp			~riedse see additional page~		
	Objections		Probate Referee: Steven Diebert OR			
	Video		Rick Smith (see note at right)			
	Receipt					
	CI Report					
	9202					
✓	Order					
	Aff. Posting			Reviewed by: LEG		
	Status Rpt			Reviewed on: 7/12/16		
	UCCJEA			Updates:		
	Citation			Recommendation:		
	FTB Notice			File 26- Kelley		
	24					

26 Additional Page, Betty L. Kelley (Estate)

Case No. 16CEPR00614

NEEDS/PROBLEMS/COMMENTS, continued:

2. Item 5(a) of the Petition is incomplete as to (3) or (4) re: registered domestic partner.

Note: If Petition is granted, Court will set Status Hearings as follows:

- Thursday, January 19, 2017 at 9:00 a.m. in Dept. 303 for the filing of the final inventory and appraisal; and
- Thursday, September 28, 2017 at 9:00 a.m. in Dept. 303 for the filing of the first account and/or petition for final distribution.

Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.

27 Elijah Mendoza, Gabbana Mendoza, Danny Mendoza (GUARD/P) Case No. 16CEPR00702

Petitioner: Elaine Martinez (pro per)
Petitioner: Evette Amparano (pro per)

Petition for Appointment of Temporary Guardian of the Person

		GENERAL HEARING 9/6/16	NEEDS/PROBLEMS/COMMENTS:
		GLIVERAL HEARING 7/0/10	INCLUSATI ROBLEMISA COMMINICINIS.
		ELAINE MARTINEZ, maternal great aunt and EVETTE AMPARANO, maternal	 Need Notice of Hearing. Need proof of personal service of
Со	nt. from	grandmother, are petitioners.	the Notice of Hearing along with
	Aff.Sub.Wit.	Please see petition for details.	a copy of the temporary petition or consent and waiver of notice
✓	Verified		or declaration of due diligence
-	Inventory		on:
	PTC		a. Albert Mendoza, Jr. (father)
	Not.Cred.		
-	Hrg	=	
-	Aff.Mail		
-	Aff.Pub.		
-	Sp.Ntc.	=	
-			
✓	Conf. Screen		
F	Letters		
√	Leners		
✓	Duties/Supp		
	Objections		
	Video		
	Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		Reviewed by: KT
-	Status Rpt		Reviewed on: 7/14/16
✓	UCCJEA		Updates:
	Citation	_	Recommendation:
	FTB Notice		File 27- Mendoza